

Conducting a Successful IBR

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Purpose of the IBR



- Achieve mutual understanding of the performance measurement baseline (PMB)
- Identify potential risks early
- Agree on a plan of action to address risks
- Provide a forum to discuss PM's expectations or concerns
- Establish a plan to address problem areas

Purpose Cont'd...



- Increase confidence in the project's PMB
- Provide a thorough understanding of the project plan
- Lay a solid foundation by which project performance will be measured

Important Objectives for a Successful Review



1. The technical scope of work is fully included and consistent with authorizing documents
2. Key scheduled milestones are identified
3. Supporting schedules reflect a logical flow to accomplish the technical work scope
4. Resources (budgets, facilities, personnel, skills, etc.) are adequate and available for the assigned tasks

Important Objectives cont'd...



5. Tasks are planned and can be measured objectively, relative to technical progress
6. Underlying PMB rationales are reasonable (attainable)
7. Managers have appropriately implemented required management processes

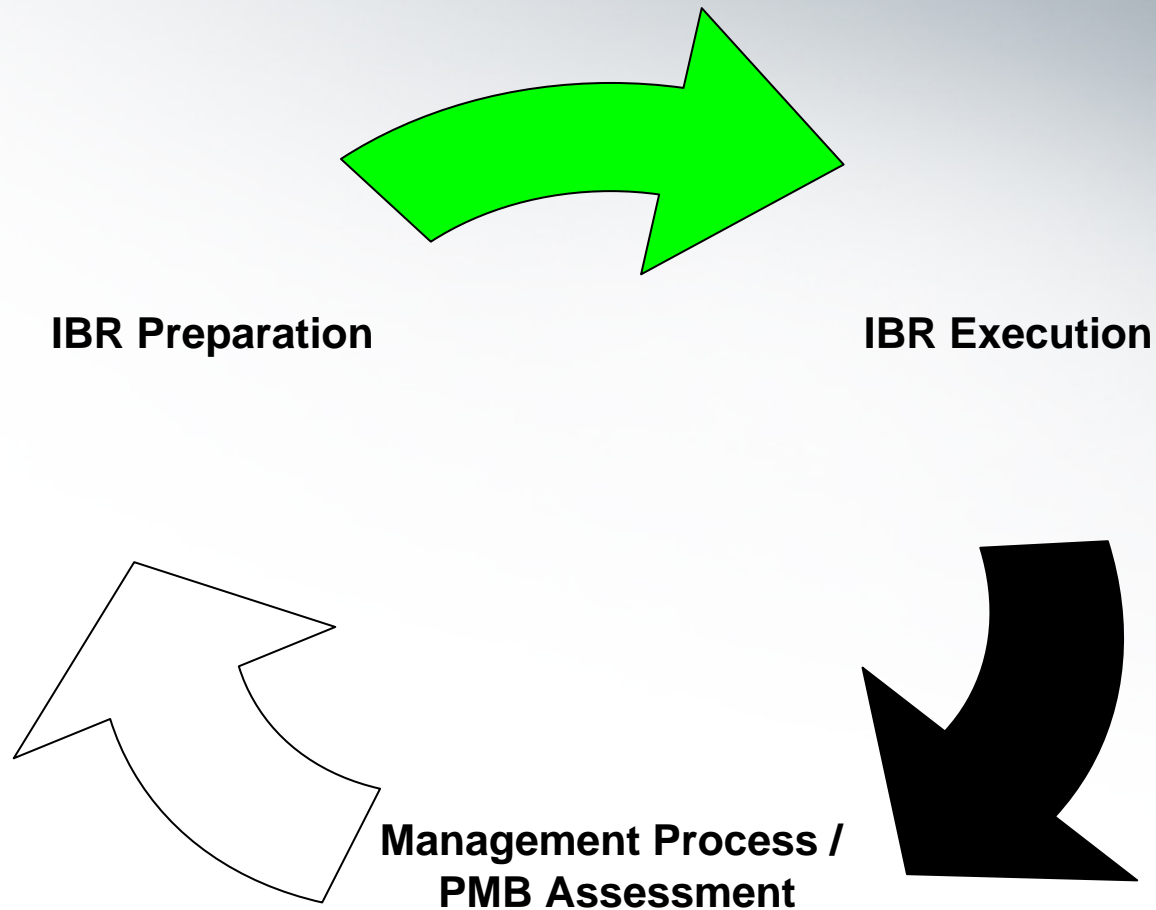
“IBR” is not End Objective...



“It is one element of an iterative, continuing process that provides a structure for program management to openly discuss the project’s plan, strengths, and risks”.*

*Source: The Program Manager’s Guide to the IBR Process, p. 4

The IBR Process



Preparation



Preparation is Key



- To ensure a successful IBR, the teams involved must be adequately prepared
- Start preparation concurrently with the development of the PMB
- Prior to IBR Execution, ensure the PMB *reflects the entire scope of work at the appropriate level*

Refer to “The IBR Success Pack”

Preparatory Steps



1. Develop plan for IBR
2. Define review objectives
3. Identify key responsibilities
4. Determine level of technical expertise required

Preparatory Steps cont'd...



5. Determine training requirements
6. Review scope, SOW, contract
7. Determine risk evaluation criteria
8. Determine procedure to document risks

IBR Preparation Checklist



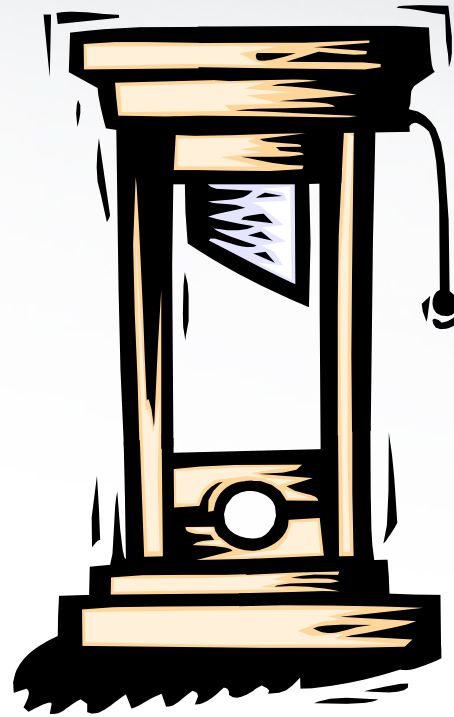
- ☐ Develop IBR Execution Plan
- ☐ Define S.M.A.R.T. Objectives
- ☐ Determine team composition
 - Integration Specialist
 - Test Engineer
 - Software Engineer
 - Business Management
 - Subcontract Management
 - Etc.

IBR Preparation Checklist cont'd...



- ☐ Training: Focus on:
 - Risk
 - Earned Value Management methods
- ☐ Perform thorough review of SOW, Contract
- ☐ Define Risk Management Plan
 - Risk Identification
 - Risk Analysis
 - Risk Quantification
 - Response Strategies

IBR Execution!



Intent of the Review

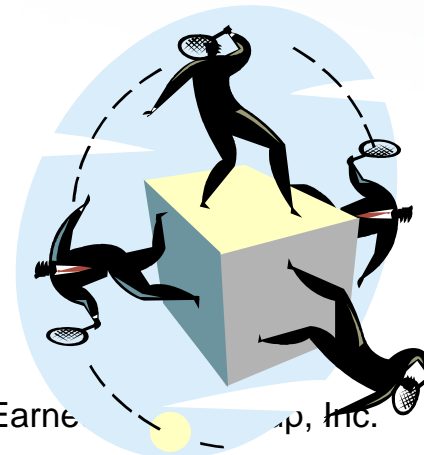


- Provide the PMs with a mutual understanding of the project performance measurement baseline
- Identify Risk
- Gain agreement on a plan of action to address identified risk

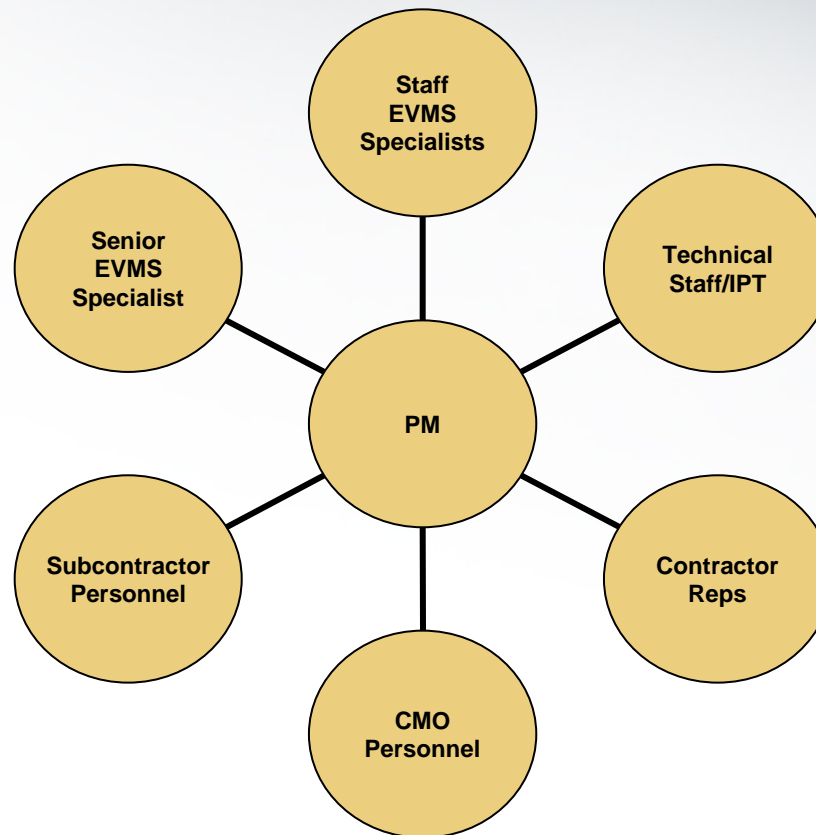
Team Composition



- Participants identified based on technical expertise
- Size and team composition should reflect program expectations and risks
- Subcontractor representative should attend



Typical Team Composition



Team Members



Primary Team

- ✓ Program Director, Team Lead
- ✓ System Engineer, Deputy System Engineer
- ✓ Technical Staff and IPT Leads

Team Members cont'd...



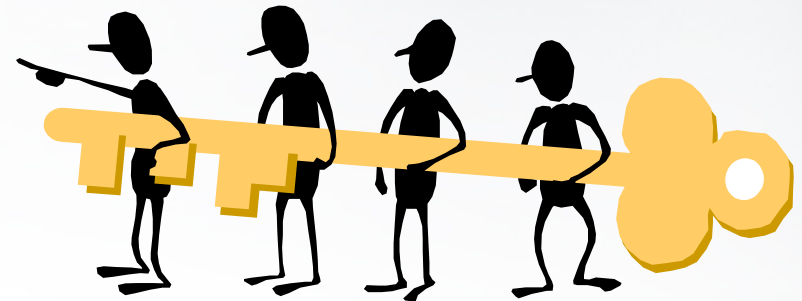
Support Team

- ✓ EVMS support personnel
- ✓ schedule analysts
- ✓ financial managers
- ✓ cost analysts
- ✓ contracting officer
- ✓ contract management personnel

Roles and Responsibilities



- Program Director and technical staff
 - Responsible for IBR
 - Representing **Key** stakeholders



Roles and Responsibilities cont'd...



- Program Managers have the sole responsibility
 - Plan the IBR
 - training
 - membership
 - agenda, in-briefing, and out briefing
 - Ensure that appropriate technical managers lead the discussions
 - Send a clear signal to all team members that this is vital to project success
 - Establish plans to incorporate IBR results into the management process

Role of Technical Staff & Integrated Project Team Leads



- Participate actively in training
- Lead/conduct IBR baseline discussions
- Resolve differences: document any concerns or issues
- Document results of discussions for future action

Role of Support Team



- **Primary**: support IBR Team Member review - assist their assessment of:
 - schedule realism
 - cost realism
 - earned value methods
- **Secondary**: Assist Program Manager with **overall *risk*** assessments such as:
 - resource constraints
 - overall funding constraints
 - indirect cost & business base assumptions

Role of Support Team cont'd...



- May use contact with contractor as a basis for initiating discussions on **related topics**
 - Establishing a joint surveillance process and metrics
 - Contractor's formal EAC process
 - Contractor use and review earned value data
 - Streamlining and tailoring reporting

Role of Contractor



- Plan and establish the program baseline
- Provide government team with an overview of their EVM system
- Participate in joint training
- Discuss adequacy of baseline and risks during IBR

Role of the Contractor cont'd...



- Documentation
 - make available for pre-IBR review
 - provide during baseline discussions
- Use EVMS to manage program baseline

Discussions During Review



- Ensure that planning is adequate at the control account level
 - Understand how risks were incorporated into the plan
- Examples of past discussions and outcomes:
 - Compared budget in control account plan to schedule. Found discrepancy - end of schedule activities without budget assignment
 - Discussed basis for cost estimate. When compared to actual history on prior contract, new estimate was aggressive (~10% less). Discussed assumptions and documented as budget risk.
 - Discussed earned value technique and came to conclusion that a different technique was warranted. Contractor agreed and revised the control account the next day.

Park It!



Anything that does not support the intent of the IBR, should be parked in a parking lot to be addressed outside of the review!

Closing the IBR



- Ensure mutual understanding and acceptance of the PMB has been reached
- Agree upon an action plan for responding to identified risks
- Document all identified risks

Post IBR



- A risk summary is provided to all PMs
- Summaries should include:
 - Identified Risks
 - Classification: High, Medium, Low
 - Response Strategy: Mitigate, Avoid, Transfer, Accept
 - Owner

Note: Risk classification should be based on criteria decided upon during the IBR.

Post IBR cont'd



- Management processes used to maintain the integrity of the PMB should be identified.
 - Baseline Maintenance Process
 - Risk Management Process
 - Business Process

Management Processes



- **Baseline Maintenance**
 - Defines how approved changes will be incorporated within the baseline
 - Ensures the PMB is maintained and always reflects current plan for accomplishing remaining work
- **Risk Management**
 - Risks are documented and classified
 - Ongoing ownership and monitoring of risks

Management Processes cont'd...



- Business Process
 - Scheduling of approved changes to the technical baseline
 - Methods for establishing estimate to complete
 - Variance and trend analysis
 - Other agency specific business support processes

Keys to IBR Success



- Managed and focused discussions led by the Program Manager
- Creation of a collaborative environment from start to finish
- Advance **preparation** and training for all participants
- Comprehensive review of program documentation by Control Account Managers prior to IBR kickoff.